

Santa Barbara Metropolitan Transit District Strategic Plan 2013-2017



Adopted November 13, 2012

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INTRODUCTION

The Santa Barbara Metropolitan Transit District (MTD) Board of Directors and staff have worked together to develop this Strategic Plan, a dynamic document that will change as appropriate to reflect new priorities, accomplishments, input, and information. The purpose of a Strategic Plan is to reflect the goals and values of an organization and to provide direction on issues and projects of importance to the Board and the community. The Strategic Plan will allow MTD to respond proactively to trends that are expected to impact our ability to meet the public transportation needs of residents of, and visitors to, the South Coast of Santa Barbara County. In developing the Plan, MTD has considered changes that are happening now and that we expect to continue in coming years:

- Economic realities will evolve.
- Energy prices will continue to increase.
- Environmental policy will change.
- Technological advances will accelerate.
- The demographic profile of the South Coast will change.
- South Coast public & private development projects will continue, including UCSB and SBCC projects.

These trends will have effects on public transportation:

- Changes in the availability of federal, state, and local funds will affect MTD's ability to meet the demand for public transit service.
- Increased cost of fuel will increase the demand for public transit and adversely affect MTD expenses.
- Changes in requirements related to greenhouse gas emissions and advances in electric and hybrid vehicles will affect the vehicle choices available to MTD.
- Increasing availability of technological advances such as wireless communication and global positioning systems will increase passenger access to MTD service information.
- Development projects and changing demographics will continue to increase the demand for MTD public transit service, requiring new sources of funds.

MTD MISSION STATEMENT

A mission statement conveys the purpose of an organization and serves as the foundation for policy and resource decisions.

The mission of MTD is to enhance the personal mobility of South Coast residents and visitors by offering safe, clean, reliable, courteous, accessible, environmentally responsible, and cost-effective transit service throughout the district.

MTD CORE VALUES

Core values are what an agency stands for. The underlying values of an agency drive behavior and support the effective implementation of the mission and goals. The MTD Board and staff conducted a Strengths, Weaknesses, Opportunities, & Challenges analysis that illuminated several of MTD's core values. A matrix of the results of the analysis is attached as an appendix.

- **Well-Run & Respected**
 - Goals 1 through 6
- **Community & Local Agency Support**
 - Goals 1 through 6
- **Professional Employees**
 - Goals 3, 4 & 5
- **Technical Expertise**
 - Goals 3, 4 & 6
- **Conservative With Public Funds**
 - Goals 3 & 6
- **Work Successfully With Other Agencies**
 - Goals 4 & 5

MTD GOALS

Goals and strategies provide the roadmap for achieving an organization's mission and values. Goals are multi-year in nature. MTD's current goals are presented below.

- 1. Provide High Quality Public Transit Service**
- 2. Maintain a Fair & Effective Fare Policy**
- 3. Responsible & Efficient Stewardship of Public Funds**
- 4. Professional, Knowledgeable & Courteous Public Servants**
- 5. Productive Community & Government Outreach Activities**
- 6. Practical and Environmentally Prudent Fleet, Facility & Real Property Management Practices**

These six goals are the strategic priorities that MTD will pursue over the next five years. As illustrated in the following pages, each goal includes one or more specific objectives that MTD will strive to meet during the Strategic Plan time frame. Each goal also includes strategies, or action items, to achieve the objective(s). Finally, each goal includes performance measures to track the agency's success in accomplishing the goal.

IMPLEMENTING THE STRATEGIC PLAN

1. PROVIDE HIGH QUALITY PUBLIC TRANSIT SERVICE

Objectives. MTD shall provide a reliable, safe, comfortable and attractive means of transportation to the general public and those who lack other options, including elderly persons, persons with disabilities, students, and economically disadvantaged persons; and to those who use mass transit by choice.

Tracking Success:

- At least 95% of all MTD revenue trips shall depart no more than 5 minutes late.
- At least 98% of all MTD scheduled revenue trips shall be completed.
- The MTD shall limit annual passenger transfers to 20% of total annual ridership.
- MTD diesel-powered revenue vehicles shall travel a minimum of 8,000 vehicle miles between *all* mechanical system failures that require a vehicle exchange.
- MTD revenue vehicles shall travel a minimum of 300,000 revenue miles between reportable safety incidents.

Action Items:

1. Establish standard to determine balance of community need and lifeline service within available revenue.
2. Sustain and enhance employee safety programs.
3. Continue analyzing ridership trends and addressing the trends via service changes.
4. Continue to increase ridership, improve customer service, and enhance security.
5. Continue progress in improving bus stops throughout the district.
6. Deliver capital projects such as the AVL/GPS system, security cameras, the backup generator, and bus replacements as soon as practicable.
7. Develop a revised passenger transfer performance measure.

IMPLEMENTING THE STRATEGIC PLAN (CONTINUED)

2. MAINTAIN A FAIR & EFFECTIVE FARE POLICY

Objective. MTD shall maintain fares at the lowest feasible level that enables the recovery of operating expenses consistent with the financial plan contained in the adopted budget.

Tracking Success:

- MTD shall maintain at least a 40% farebox recovery ratio over any 3-year period.
- MTD shall strive to maintain special pass program fees similar to the adult 10-ride pass fare.

Action Items:

1. Assess fare revenue by category in annual budget document.
2. Include analysis of fare payment trends in financial forecast.
3. Maintain special pass program fees that are consistent with the general fare policy.

IMPLEMENTING THE STRATEGIC PLAN (CONTINUED)

3. RESPONSIBLE & EFFICIENT STEWARDSHIP OF PUBLIC FUNDS

Objectives. MTD shall ensure the responsible expenditure of public funds, and shall continually seek improvements in its operating efficiency.

Tracking Success:

- Track budgeted growth in cost per service hour versus change in the Consumer Price Index.
- Status of recommended changes in practice and/or policy pertaining to the annual audit and triennial reviews.
- The MTD system shall carry an average of not less than 36 passengers per revenue hour for any 3-year period.
- The MTD system shall carry an average of not less than 2.5 passengers per revenue mile for any 3-year period.
- Projected operating reserves versus the minimum reserve balance approved by the Board will be included in the annual operating budget.
- Report to Board on progress regarding additional capital and operating funding opportunities.

Action Items:

1. Ensure a transparent and timely implementation of auditor and/or reviewer's recommendations resulting from state, federal and local audits and reviews.
2. Board members and appropriate staff shall continue to complete periodic ethics training.
3. Continue to provide quarterly financial updates to the board of directors, including comparisons versus budget and prior year results.
4. Continue to address unfunded liabilities through structural changes, including retiree health care costs and others.
5. Develop an orientation process for new Board members, including financial and fiduciary orientation.
6. Staff will annually project operating reserves versus the reserve balance.
7. Staff will continue to pursue all practical capital and operating funding opportunities.

IMPLEMENTING THE STRATEGIC PLAN (CONTINUED)

4. PROFESSIONAL, KNOWLEDGEABLE & COURTEOUS PUBLIC SERVANTS

Objectives. MTD will strive to ensure its employees are well-trained public transit professionals. MTD shall treat all individuals with fairness and respect, including passengers, employees, and all others involved in MTD activities.

Tracking Success:

- Report to Board regarding survey results
- Passenger complaints shall average no more than 1 complaint per 10,000 MTD passenger boardings.

Action Items:

1. Continue customer service training for all employees that interact with the public.
2. Continue to encourage staff to take advantage of training opportunities to stay abreast of industry practice.
3. Recognizing the limited time frame to the retirement of the current General Manager, create a succession plan during FY 2013 that includes cross-training and education, thus assisting current staff members to become eligible for consideration for promotion within the district.
4. Conduct surveys (e.g., customer satisfaction, origin/destination, etc.) to track MTD service.
5. Develop an objective evaluation system and create a policy of performance-based salary increases for staff members.

IMPLEMENTING THE STRATEGIC PLAN (CONTINUED)

5. PRODUCTIVE COMMUNITY & GOVERNMENT OUTREACH ACTIVITIES

Objective. MTD shall work cooperatively with individuals, businesses, community organizations, and government agencies to plan and develop the best transit service possible within the limits of available funding.

Tracking Success:

- Annual report for the public
- City and county policy board presentations.
- Participate in Chamber and other business and community events, and work with communities and stakeholders on relevant development projects.

Action Items:

1. Participate in local and regional bus and rail transit planning with the goal of recognition by all parties of the necessity of including public transit in the planning process.
 - a) Stay involved in SBCAG discussions, to ensure the coordination of land use and transit needs in the South Coast.
 - b) Continue to monitor Measure A funding and keep the Board apprised.
 - c) Stay involved in emerging South Coast general plans.
 - d) Work with UCSB to create and implement a “Transit Plan” related to the UCSB Long Range Development Plan and the resulting impact on MTD service.
 - e) Continue to encourage UCSB, SBCC, and local school districts to accept their responsibility for the costs associated with transportation service for their students and campus.
 - f) Plan to enhance MTD’s Transit Center and work with all relevant agencies.
2. Work with community members and continue to monitor the county process and decision regarding MTD's Calle Real property to change the zoning back to residential.

IMPLEMENTING THE STRATEGIC PLAN (CONTINUED)

6. PRACTICAL AND ENVIRONMENTALLY PRUDENT FLEET, FACILITY & REAL PROPERTY MANAGEMENT PRACTICES

Objective. MTD shall continue to research, implement and promote feasible solutions to encourage environmental sustainability and resource conservation.

Tracking Success:

- The MTD revenue vehicle fleet shall comply with California Air Resource Board mandates.
- The MTD systemwide spare ratio shall not exceed 20%.
- MTD diesel-powered revenue vehicles shall travel a minimum of 10,000 vehicle miles between *major* mechanical system failures that require a vehicle exchange.

Action Items:

1. Maintain and expand, as feasible, the electric vehicle program
2. Report annually to the Board of Directors on MTD's CARB compliance status.
3. Seek opportunities to participate in proof-of-concept demonstrations for new technologies, and identify additional stimulus funding that may become available.
4. Pursue the installation of solar electric-generating facilities in the main yard, if feasible.
5. Explore opportunities for operational savings, seating capacity and comfort through diverse transit fleet vehicles.
6. Create a long-term policy, for the Board's direction, on the future use of the District's real estate assets.
7. Develop a graffiti removal performance measure.

UPDATING THE STRATEGIC PLAN

This strategic plan will be reviewed annually by the staff and Board in conjunction with MTD's budget process, to determine whether changes are warranted. Key steps that will help the organization keep on track and update the plan include:

- Annually review the strategic goals, objectives, and performance measures to determine if they remain appropriate to meet changing conditions.
- Have each member of the management team annually use the strategic plan to guide their individual and department work plans.
- Keep the Board apprised of progress toward achievement of the strategic goals by sharing information regularly.
- Keep MTD staff and the public updated regarding the accomplishment of strategic plan goals and action items.
- Make MTD's mission, values, and goals highly visible to the greater community.

Appendix



Santa Barbara Metropolitan Transit District Issues Analysis Matrix

INTERNAL	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> Professional Employees Technical Expertise Staff's Ability to Forecast Well-Run & Respected Community Support / Local Agency Support MTD is the South Coast Regional Transit Provider Political Exclusivity Fleet Diversity Makeup of Current Fleet (Age) Fiscal Philosophy Transit Center Ridership / Farebox Ratio MTD-Owned Real Estate Work With Agency Planning Departments 	<ul style="list-style-type: none"> Transit Center is Aging MTD Does Not Have SBCAG Membership Lack of Federal or State Lobbyist Passenger Information (Receiving & Sending) Lack of Funding Source for Expansion Internal Communication MTD's "Cost of Doing Business"
EXTERNAL	
OPPORTUNITIES	CHALLENGES
<ul style="list-style-type: none"> Linear Nature of Service Area UCSB - LRDP Measure A Interregional Service SBCAG Board Membership Local Agency Land-Use Decisions Fuel Census Results / FTA Policy Development Impact Fees (Potential for) Information Superhighway Social Media Employers (Transit Benefits) Transit Center - Interagency Agreements Increased Local Service Operating Subsidy SB 375 - Regional Transportation Plan (RTP) 	<ul style="list-style-type: none"> Linear Nature of Service Area UCSB - LRDP Measure A Interregional Service SBCAG Board Membership Local Agency Land-Use Decisions Fuel Census Results / FTA Policy Development Impact Fees (Lack of) Economy / Federal, State, & Regional Budgets Temptation to Change Fiscal Philosophy Recent Ridership Decrease Excessive Overloads Rail Dollars / TDA Losing Control of Transit Planning Natural Disasters & Terrorism Shifting Public Priorities Aging Demographics

The MTD Issues Analysis resulting in this matrix was conducted November 30, 2010.